DOCUMENT RESUME

ED 232 692 IR 050 340

TITLE Report of the Council on Library and Network Development on Regional Organizations for Interlibrary Cooperation and Resource Sharing: The Development of Multitype Library Systems in Wisconsin. Bulletin No. 3226.

INSTITUTION Wisconsin State Dept. of Public Instruction, Madison. Div. of Library Services.

PUB DATE Dec 82

NOTE 16p.

PUB TYPE Guides - General (050) -- Legal/Legislative/Regulatory Materials (090) -- Viewpoints (120)

EDRS PRICE MF01/PC01 Plus Postage.

DESCRIPTORS Check Lists; Guidelines; *Library Cooperation; *Library Networks; *Library Planning; Program Development; Public Libraries; *Shared Services; State Aid; State Programs; *Statewide Planning

IDENTIFIERS *Multitype Library Networks; *Wisconsin

ABSTRACT

Completed in partial fulfillment of Wisconsin Statutes, Chapter 347, Laws of 1979, this Council on Library and Network Development (COLAND) report makes recommendations for developing multitype library systems in Wisconsin to facilitate resource sharing between public, school, academic, and special libraries. It is noted that the recommendations (1) advocate building on an existing statutory structure, public library systems, in the development of multitype library systems; (2) support enabling legislation for area multitype library systems within 3 to 5 years; (3) advocate a gradual transition into area multitype library systems; (4) do not negate the Council's priority for adequate funding for public library systems; (5) recognize that an additional amount of state funding will be required for area multitype library systems; and (6) advocate a united approach to planning for library cooperation. The report describes the history, purpose of, and need for multitype library systems in Wisconsin. It then presents recommendations for their geographic structure, membership or participation, clientele served, services, governance structure, staffing, and funding, as well as recommendations for the transition from the current public library systems to multitype systems. Differences between COLAND recommendations and recommendations from previous planning reports, particularly the 1981 Wisconsin Library Network Plan Report, are also noted. (Author/ESR)

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REPORT

OF THE

COUNCIL ON LIBRARY AND NETWORK DEVELOPMENT

ON

REGIONAL ORGANIZATIONS FOR INTERLIBRARY COOPERATION AND RESOURCE SHARING: THE DEVELOPMENT OF MULTITYPE LIBRARY SYSTEMS IN WISCONSIN

Madison, Wisconsin
December, 1982

Bulletin No. 3226

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PREFACE

This report was prepared and approved by the Council on Library and Network Development. Members of the Council are:

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The Council on Library and Network Development is advisory to the Wisconsin Department of Public Instruction and the Division for Library Services.

INTRODUCTION

This report is in response to the directive of Wisconsin Statutes, Chapter 347, Laws of 1979 which states:

> "(3) Study of regional organizations for interlibrary cooperation and resource sharing. The council on library and network development shall study the development and structure of, standards for, and the desirability of providing, state aids to regional organizations for interlibrary cooperation and resource sharing, and make recommendations to the state superintendent of public instruction. The council shall make its recommendations and the state superintendent shall transmit the recommendations to the governor and the legislature on or before December 31, 1982."

In Wisconsin, library cooperation, formal and informal, among public, school, academic and special libraries is common. Librarians have found cooperative arrangements to be a way of providing better services to the users of libraries, i.e., better service for lower cost, easier access to more materials and more rapid availability of materials. (Additional information about multitype library cooperation in Wisconsin can be found in the State Superintendent's Report on Multitype Library Cooperation, to be published in early 1983).

The specific framework or structural arrangements for area library resource sharing vary across the state. There are a variety of organizations at the area level which serve to coordinate and encourage the development of cooperative programs among all types of libraries. These organizations range from nonprofit educational corporations, librarian associations and committees, to public library systems. The funding sources which support library cooperation activities at the area level also vary. They include dues and fees, volunteer support, federal grants and state funds (through public library systems).

Although a number of recent statewide studies and planning efforts have indicated a high priority for resource sharing programs among different types of libraries, Wisconsin does not have legislation or funding for cooperative multitype library organizations or systems. Public library systems in Wisconsin receive state aids and have a statutory mandate to participate in cooperative programs with other types of libraries. These libraries do not receive state aids specifically related to library cooperation, nor do they have a specific requirement to participate in cooperative library programs. This situation has led to perceived inequities between public library systems and other types of publicly funded libraries.

A major constriction to cooperative programs among libraries is funding.

Most resource sharing programs among different types of libraries have been funded by federal Library Services and Construction Act Funds. These are funds designated for experimental, pilot projects and are not intended for on-going activities.

The recommendations in this report have many similarities to the recommendations of a larger planning effort conducted in Wisconsin in 1980-81: the Wisconsin Library Network Plan Project. The goal of the Wisconsin Library Network Plan project was:

> "To design and recommend an appropriate structure and funding for cooperation among libraries of all types at the area level in Wisconsin, tying this structure to the state level library network."

The members of the Council on Library and Network Development studied the recommendations found in the Report of the Wisconsin Library Network Plan Project*, reaffirmed many of the assumptions and conclusions of that Report but made some significant changes in the recommendations.

The members of the Council on Library and Network Development based their recommendations on some general assumptions about cooperation among libraries:

Libraries of all types--academic, school, public and special--share the common goal of providing materials, information and programs to meet the needs and interests of individuals and groups. These needs and interests vary from library to library, of course, as do the individuals and groups for whom library services are provided. Libraries of different types are established to serve a large variety of users, from the general public, to students and faculty at all levels, public administrators and policy makers, the business community, and residents of health and social service institutions. The needs and interests for which libraries provide materials and information cover a wide range: educational, research, professional or work related, cultural, and recreational. Each type of library has a basic responsibility for a particular clientele and a basic responsibility for providing library materials services appropriate to that clientele.

Resource sharing is a method to meet the information needs of people. Sharing materials among libraries through interlibrary loan is one method of providing access to materials. Location information about specific books or periodicals can improve access to users. Coordinated educational programs for librarians is a resource sharing strategy to improve quality and reduce the cost of continuing education

* Wisconsin Library Network Plan Steering Committee. Wisconsin Library Network Plan Report: Recommendations for Network Development at the Area Level. [Madison] Wisconsin Department of Public Instruction, 1981. 68p. (This project was partially funded by the Library Services and Construction Act.)

for library personnel from all types of libraries. Resource sharing programs should build on the blocks of basic library services from each member unit. Library cooperation or resource sharing programs are most effective when built on strong member units. In order to provide the best possible library services, librarians from different libraries should work together to enrich, supplement and strengthen each other's basic services in various library resource sharing programs.

The Council on Library and Network Development made some significant changes from the original Wisconsin Library Network Plan Report:

-- The Council on Library and Network Development recommendations support the development of one model, not multiple options, for the governance structure of multitype library systems in Wisconsin.

-- The Council on Library and Network Development recommendations advocate a lay board to govern multitype library systems. The lay board would include members representing the interests of all types of libraries.

-- The Council on Library and Network Development recommendations include provision of an educational media consultant as part of a multitype library system staff.

A discussion of the specific issues and recommendations follows.

ISSUES AND RECOMMENDATIONS

The Council on Library and Network Development recommendations affirm the following principles:

-- The Council on Library and Network Development recommendations advocate building on an existing statutory structure, public library systems, in the development of multitype library systems in Wisconsin.

-- The Council on Library and Network Development recommendations support enabling legislation for multitype library systems within three years to five years.

-- The Council on Library and Network Development recommendations advocate a gradual transition into multitype library systems.

-- The Council on Library and Network Development recommendations for the development of a model for multitype library systems do not negate the Council's priority for adequate funding for public library systems.

-- The Council on Library and Network Development recommendations recognize that an additional amount of state funding will be required for multitype library systems.

-- The Council on Library and Network Development recommendations advocate a united approach to planning for library cooperation. Information from several Division for Library Services and Department of Public Instruction planning efforts are merged with these recommendations.*

HISTORY

A number of statewide studies and planning efforts in recent years has addressed the topic of resource sharing. However, no statewide programs or plans have been produced which, in the view of the Wisconsin library community, have addressed adequately or completely resource sharing matters. The strengths of the several studies and planning efforts have been their identification of major issues and barriers to cooperation and their endorsement of the concept of improving library services through cooperation and networking.

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* In completing its recommendations, the Council on Library and Network Development considered information from other Department study projects including the Regional Media Center and Coordinated Educational Service Agency (CESA) studies and the Wisconsin Dissemination Project.

NEED

-- Cooperation among libraries contributes greatly to access of library users to all library resources.

-- Libraries cannot hope to be self-sufficient in these times of cost escalation, increasing user demands and the literature and information expansion. Cost savings might be realized from cooperative activities.

-- Cooperative use and planning are essential in order to make judicious use of available library resources.

-- By joining together to supplement their individual resources and services, libraries can provide their users with a wide range and variety of materials and information.

-- Cooperative planning by librarians from different types of libraries in an area contributes to the professional enrichment and growth of librarians and media specialists.

-- Development of multitype library systems provides access for Wisconsin residents to library resources in all areas of the state on an equitable basis.

PURPOSE

The purpose of an area multitype library system is to provide a formal framework within which public, school, academic and special libraries can share services and materials and provide other services to ensure that Wisconsin residents have access to the materials and information in Wisconsin libraries and media centers, directly or through cooperative arrangements.

An area multitype library system should:

1. Facilitate planning for cooperative use of available resources.

2. Promote cooperative and coordinated services among all types of libraries.

3. Develop and improve library services through the sharing of resources.

4. Provide the mechanism for coordinating multitype library system services within an area.

GEOGRAPHIC AREA

Multitype library systems should conform to public library system boundaries or multiples thereof. School districts and other library jurisdictions which cross system boundaries could decide which area multitype system to join.

MEMBERSHIP OR PARTICIPATION

Libraries of all types should be eligible to participate in the services provided by an area multitype library system. The method of participation of for-profit special libraries and non-public school, academic and special libraries should be included in legislation for multitype library systems. Membership for all libraries should be voluntary. State aid funds and system services should serve as incentives to encourage libraries to participate in area multitype systems in order to broaden the base of materials and services available in an area. There should be clearly stated agreements, defining responsibilities, services, policies, etc., between the system and participating member libraries. The membership agreement may vary depending on type of library and system area, but within statutory provisions. The system governing body, as well as the member library could accept or reject the agreement during a specified negotiation period.

The governing bodies or boards of individual participating academic, public, school, special institution libraries and single type library networks will continue to be responsible for their own internal policies and funds.

CLIENTELE SERVED

Multitype library systems benefit all users of Wisconsin libraries by increasing their access to available library resources through cooperative arrangements and planning by participating libraries.

SERVICES

Mandated services of multitype library systems basically would follow current statutory public library system requirements, but would be planned and implemented in a cooperative library context.

For further explication of system service requirements, compliance criteria could be developed.

As with current public library systems, multitype library systems would be required to address the mandated services in their annual plans. Specific activities to carry out these services could be designed to meet specific area needs, and could vary among systems.

Coordinated planning of automation activities among libraries is crucial to many library services, both for reasons of efficiency and economy. Many of the following services would be improved by computerized applications planned in a cooperative or multitype context. Automation is included as a possible activity or method for achieving many of the service goals.

REQUIRED SERVICES	EXAMPLES OF POSSIBLE ACTIVITIES
1. Interlibrary Loan	-- Library to library sharing of materials -- Referral of requests beyond area -- Resource library(ies) contracts for interloan backup -- Computer applications
2. Reference and Referral Services	-- Library to library requests for information -- Referral of requests beyond area -- Resource library(ies) for reference backup -- Subject data base access (BRS, ERIC, Dialog, etc.) -- Computer applications
3. Delivery and Communications	-- TWX, TWP, OCLC, mail, telephone -- Trucks, vans to deliver materials -- Telefacsimile -- Computer applications
4. In-Service Training/ Continuing Education	-- Workshops, conferences for library staff, trustees, administrators -- Communication among librarians; newsletters -- Clearinghouse for professional information -- Support of intellectual freedom
5. Professional Consultant Service	-- Consultation to member libraries
6. Provisions for Resource Library(ies) Services in the System Area	-- Resource library(ies) services to system residents -- Computer applications

7.	*Open Access or Reciprocal Borrowing	-- Honoring of borrowers' cards in the system by all publicly funded libraries -- Computer applications
8.	Planning and Developing Materials and Services to Meet the Needs for the Isolated, Disadvantaged and Handicapped	-- Rotating collections - specialized, expensive materials -- Bookmobile -- Books-by-mail -- Loan of special materials (e.g., large print, talking books) - to individuals - to libraries for individuals -- Subregional libraries -- Service to institutionalized -- Computer applications
9.	Coordinated development of collections, services, equipment	-- Identification of specialized materials and equipment -- Jointly developed selection policies -- Centralized film collection -- Equipment repair service -- Storage of little used materials -- Subject specialization -- Computer applications
10.	Area and Statewide Data Base Development (Development of Location Tools)	-- Union lists (manual or automated) of monographs, serials, audio-visual materials -- Computer applications
11.	Service Agreements With Adjacent Library System	-- Continuing education programs -- Reciprocal borrowing across system lines -- Computer applications

Examples of optional services for multitype library systems include public relations, centralized technical services, grants to member libraries, and research and development programs.

* Arrangements so that a library's resources are available to people not among its primary users. This may include appropriate specified conditions, depending on the library's policy.

GOVERNANCE STRUCTURE

There should be statutory recognition for area multitype library systems.

The Department of Public Instruction, Division for Library Services with input from the Council on Library and Network Development, should be responsible for receiving and approving annual area system plans of service from and disbursing state funds to the system board.

The governing body of an area multitype library system is responsible for:

-- Setting area systems policies and administering mandated services
-- Planning systems services - annual and long-range
-- Receiving and approving the disbursal of appropriated funds
-- Monitoring, reviewing and evaluating network services
-- Employing and evaluating personnel
-- Complying with statutory provisions

The board should be composed of lay persons representative of the interests of citizens and all types of participating area libraries. The library representatives would be non-librarians, i.e. administrators or policy makers of libraries.

There should be certain statutory requirements, consistent statewide, for the appointment and composition of the governing body of all area multitype library system boards:

1. The membership should be appointed by the county board(s) of participating counties from a slate of nominees developed by an appointment committee representing the interests of public, school, academic, and special libraries in the system area. The method of selecting the nominees and appointment committee would be a local option and would be included in the report of the planning committee for the development of multitype library systems.

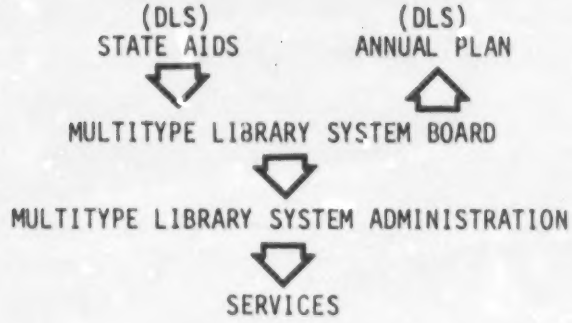
2. The membership should include at least fifteen but not exceed twenty persons.

3. The membership should be rotated and terms limited.

4. The membership should be representative of the interests of different types of libraries participating in the area system.

5. Each county board of participating counties may appoint one county board member to the system board; but if there are more than five counties, the total number of county board members shall not exceed five and county board representation shall be on a rotating basis.

Services mandated for (former) public library systems should be incorporated into services mandated for multitype library systems and administered by the multitype system board.



(PUBLIC LIBRARY SYSTEM SERVICES INCORPORATED
INTO THE MULTITYPE LIBRARY SYSTEM)

Public library systems would continue to exist during a transition phase which would involve a planning phase and demonstration of services. (See Transition to Multitype Systems)

STAFFING

Staffing of multitype library systems should be determined within the system area and described in the system annual plan. An educational media consultant should be part of the multitype library system. The type and number of staff would reflect the funding available, programs to be carried out and other factors such as number and types of libraries served and geographic area. There could be cooperative sharing of staff across system lines for specific services or specialities, e.g., automation, media services, childrens' services, as appropriate.

FUNDING

There should be some level of state funding for area multitype library systems.

The current level of funding for public library systems is not sufficient to fund services which would include system services for school, academic and special, as well as public libraries. Since the options for area multitype library systems will have implications for existing public library system services and structure, counties should continue to play a key role.

The multitype library system will receive and administer one fund for multitype library system services. Former public library system services will be funded and administered through the multitype library system board.

The state funds should be disbursed through the Division for Library Services. Area multitype library systems would be required to submit annually to the Division for Library Services a plan showing how the state funds are to be used in carrying out specified required services. The state funds should be the primary source of support for the required services, although there should be flexibility to allow other financial arrangements, such as contracts that may be necessary.

The multitype library system board should have the responsibility for receiving and disbursing multitype library system aids for all multitype system library services in the area.

Final recommendations for funding amounts will be postponed until the completion of the Public Library Development and Funding Study and demonstration projects.

TRANSITION TO MULTITYPE LIBRARY SYSTEMS

Evolution to multitype library systems will require changes from what exists now. The transition process should be regarded as a long-term, evolutionary process. While some level of planning can be undertaken within the governing structure of present public library systems, legislation will be required before meaningful change and service delivery can take place.

Legislation will be required in the following areas:

Transition process
New governing structure
New funding mechanism
New service requirements

Transition process: The planning process should be specified in the statutes. Experience with public library system development provides a useful precedent. Planning committees should be appointed. In areas where public library systems exist, the planning committee would be appointed by the public library system board on its own or upon petition by any citizen in the system area. The planning committee should have a majority of lay members and should be representative of the interests of all types of libraries, county boards and the area's population distribution. The system board should notify the Division for Library Services upon appointment of the committee. The committee should investigate the potential for development of a multitype library system in the area and prepare a three year service plan. The committee should conduct hearings to which representatives and users of all libraries in the area are invited. The committee's final report should be filed with the public library system board, the county board(s) and submitted to the Division for Library Services for approval or rejection. In addition to the planning committee, a professional advisory committee, representative of all types of libraries, would be appointed. The library advisory committee would advise the system board on multitype planning projects during the transition period from public library systems until the creation of a multitype library system board.

In an area without a public library system, the process would be slightly different. The county board would appoint a planning committee and notify the Division of its appointment. The committee would investigate the potential of either a public library system or multitype library system and prepare an organizational and service plan.

Planning grants for transition from public library systems to multitype library systems would be for three year renewable periods.

New governance structure: The formation of a multitype system board and its powers and duties should be authorized and described in the statutes. (See section on governance structure)

New funding mechanism: The funding formula and mechanism for multitype library systems should be defined in the statutes.

New service requirements: Service requirements for multitype library systems should be specified in the statutes.